

Research Foundation for SUNY

Test Plans for SUNY PACS Grants

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| **Test Description:** | 15. Test the ability to Create a Renewal Funding Proposal |
| **Tester Location:** |  |
| **Test Executed By:** |  |
| **Tester Email Address:** |  |

**Test 15: Create a Renewal Funding Proposal**

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| Step | Test Steps | Test Data | Expected Results | Notes |
| 1 | Open browser and navigate to <https://pacsstg3.rfsuny.org/SponsoredPrograms/login> |  | * The SUNY PACS website login page is presented. |  |
| 2 | Log in as **Grantsspecialist**  (Test accounts have been provided) |  | * Log in is successful * **Inbox** displays |  |
| 3 | Click on Grants (tab on the Top), Prerequisite: Find a proposal that is in a state of Awarded.  Click on the proposal Name and Open up the proposal. | Chose the proposal awarded in Test 13 | * The proposal page will display | **NOTE: Save and Continue along the way as you proceed thru the below steps** |
| 4 | Click on the **Create Renewal** button on the left hand side of the screen.  Change proposal name (Optional)  **Click OK** |  | * Create renewal form displays * Proposal Description & Contacts form displays |  |
| 5 | **Proposal Description & Contacts**  **Click Edit Funding Proposal** Modify any fields from previous proposal for the renewal**. (Optional)**  **Q 1.0** Short title of Proposal – Defaults  **Q 2.0** PI – Defaults  For the following, click add and upload attachments needed:   * COI Disclosure * Biosketch * Other Support   **Q 3.0** Research Coordinator –Defaults  To Change:  Select the name of Research Coordinator by **clicking** the **Select** button and list of values displays. Search by last name for the name of the Research Coordinator, **click** on circle next to the name and click **OK.**  **Q 4.0** Administrative Contact – Defaults  To Change:   * Select the name of the Administrative Contact by **clicking** the **Select** button and list of values displays. * Search by last name for the name of the Administrative Contact. * C**lick** on circle next to the name.   Click **OK.**  **Q 5.0** Select Sponsor –select a sponsor  **Q 6.0** Defaults to yes, change if necessary.  **Q 7.0** Select team members that have **EDIT** rights by clicking the **Add** button and click the box next to the name of the person or persons you need to add, then click **Ok**.  **Q 8.0** Select team members that have **READ** only rights by clicking the **Add** button and click the box next to the name of the person or persons you need to add, then click **Ok**. | Add Attachment1  Add Attachment 2  Add attachment3  Pick any name from the list of values.  Pick any name from the list of values.  Select sponsor from original proposal.  Keep as Yes  Pick any name from the list of values for this test.  Pick any name from the list of values for this test. | * Data is updated |  |
| 6 | **Additional Personnel**  Add any personnel (Optional)  **Q 1.0** Institutional Personnel  Add FP\_Additional Personnel Window:   1. select staff member 2. select project role 3. Attach Biographical Sketch 4. Attach Current and Pending Support Documentation 5. This individual is a:   Senior/Key Person on the proposal  Other Significate Contributor on the Proposal  Other Personnel   1. Should this user be included on the Credit Distribution page? 2. Click OK and Add another   **Q 2.0** Non-Institutional Personnel | Select any person this will be the co pi  Select Co-PD/PI  Upload attachment4  Leave blank    Senior  Select ‘Yes’  Leave black for this test. | * Data is updated. | **NOTE: THE PEOPLE SELECTED WILL BE AVAILABLE FOR BUDGETING PURPOSES Note: IF YOU WANT ‘TBD’ MAKE SURE YOU SELECT IT HERE AS OTHER PERSONNEL.** |
| 7 | **General Proposal Information**  **Q 1.0** Type of Application – Defaults to Renewal  **Q 2.0** Sponsor# - Defaults because this is a renewal  **Q 3.0** check other  **Q 4.0** Instrument type – Make a selection  **Q 5.0** Purpose of project –select from LOV  **Q 6.0** Clinical Trial?- yes or No  **Q 7.0** Multi-PI Submission - yes or No  **Q 8.0** On or Off Campus? - yes or No | Other  Grant  Research-Basic  No  On Campus | * Changes Made are accepted |  |
| 8 | **Research Department Determination**  **Q 1.0** Submitting Department – select Dept.  **Q 2.0** Defaults | 1) Department for the test PI you are logged in as.  2)Enter location of user | * Data is updated |  |
| 9 | **Compliance Review**  **Q 1.0** select yes or no for each choice  **Q 2.0** select yes or no  **Q 3.0** select yes or no |  | * Data is updated |  |
| 10 | **Export Controls**  Answer question 1.0 – 9.0 which are all required. Answer yes to question 9.0 will display a text box which must be completed | Answer yes to Quesiton 9 | * Data is updated |  |
| 11 | **Campus Specific Documents**  If a required campus document is attached in Q1 then user must download it and complete and then reload it. | Only answer this question if you attached in Question 1 | * Document uploaded |  |
| 12 | **Campus Specific Questions**  Form Appears IF the users location has developed campus specific Questions  Complete the questions if the form appears |  | * Data is updated |  |
| 13 | **Program Classification Form**: Q 1.0 optional, Q 2.0 required. |  | * Data is updated |  |
| 14 | **General Submission Information**:  Questions 1.0 Primary Sponsor floods from previous questions.  Question 2.0 – Optionally Attach any general submission documents | Answer defaults  Skip attachment | * Data is updated |  |
| 15 | **Submission Dates**:  Q 1.0 -4.0 – 1.0, 3.0, 4.0 are required.  Enter dates for Q1, Q3 and Q4 |  | * Data is updated |  |
| 16 | **Budget Periods**: This is Optional and can be updated later. | Skip this question. | * Values for the budget periods will now display. |  |
| 17 | **Research Performance Sites**: Q 1.0 and Q 2.0, Q 1.0 will be populated with the campus Sponsored Research Location. Q 2.0 click Add if additional project/performance locations. | 1. will default   2.0 leave blank | * Values for Research Performance Sites will now display. |  |
| 18 | **Project Attachments**: Add any attachments for Q1-Q7 | Question 1-attachment 5  Question 2 –attachment 6  Question 3 attachment 7  Question 5 attachment 8  Question 6  Attachment 9  Question 7  Attachment 10 | * Attachments can be uploaded |  |
| 19 | **Completion Instructions**: Click Hide/show errors to validate the completion of the form  Clean up an errors if they are found. If NO errors click **Finish** |  | * Information is now saved and No errors exist on the form and the Funding Proposal page will now be displayed |  |
| 20 | Add Credit Distribution: Click on the Credit Distribution Link on the left hand menu.   * Add a department to the 1st person * Fill in the different Credit percentages for Proposal credit, Financial Credit and Recognition Credit. * Click Apply and then OK   Note: The total percentage per person should not exceed 100%  Note: The total proposal credit for all individuals can NOT exceed 100% |  | * Credit has been applied to each person by department * Note: The Department listed will be notified for the approval of the proposal. |  |
| 21 | Add Budget to complete the renewal Proposal. This is documented in another test plan. Once complete the renewal can be submitted for department review. |  | * Proposal in Draft state until it is submitted for departmental review |  |
| **End of Test** |  |  |  |  |